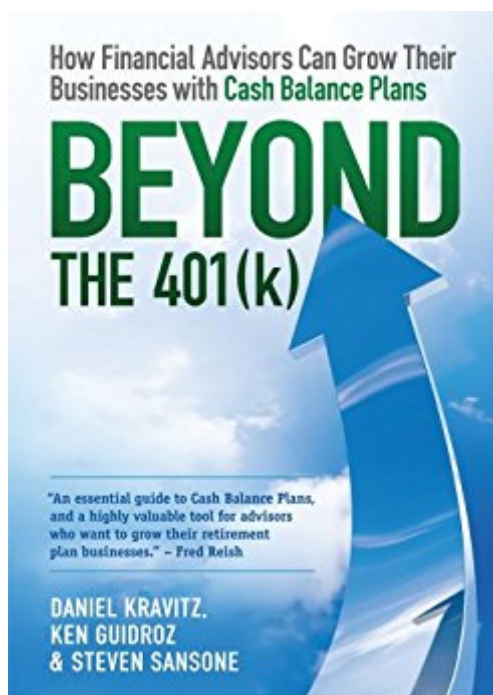


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# Beyond The 401k: How Financial Advisors Can Grow Their Businesses With Cash Balance Plans



## Synopsis

A complete step-by-step guide to help financial advisors and retirement plan professionals gain a competitive edge using Cash Balance Plans. Considered the retirement industry's best kept secret, these unique tax-favored hybrid plans combine the high contribution limits of defined benefit plans with the flexibility and portability of 401(k)s. The authors are part of the expert team at Kravitz, the national leader in Cash Balance Plan design, management and administration. This accessible, highly readable book explains all the essentials of these complex tax-qualified plans. Supported by case studies, checklists, charts and diagrams, the book shows exactly how Cash Balance Plans can take business owners beyond the 401(k) to accelerate retirement savings, reduce taxes, and deliver better benefits for employees.

## Book Information

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## Customer Reviews

I really love this book. I read it once cover to cover and am going back through it to try to really engrave it in my memory. It is the most understandable, readable explanation of Cash Balance plans that I have ever seen. If you are a professional service provider, sole proprietor, or other high

earning individual frustrated by the low limits on your tax deductible contributions your defined contribution plan, **READ THIS BOOK!** If you are an investment advisor for retirement plans, a CPA providing tax and business planning advice, a TPA for retirement plans, or another professional involved with retirement plans, you can't afford NOT to read this book. If you are a retirement plan actuary, you may know what's in this book. But you won't know how to explain it in any language that the average person can understand - so **GET THIS BOOK!** Kudos to the authors for making Cash Balance plans accessible to thousands of people, directly or indirectly, and making the dream of retiring more accessible to all.

Beyond the 401(k) is a must read for all Financial Advisors and Retirement Plan Consultants that are looking to take their business to the next level. Dan Kravitz and his team will teach you how to utilize the Cash Balance plan to help your clients achieve maximum tax deductions and their employees maximize their retirement outcomes. I highly recommend this book.

The first day I met co-author Dan Kravitz, he provided me with a copy of this book. I picked it up that evening and had a difficult time putting it down. The authors did a masterful job of taking a technical (but very cool) concept and presenting it in a way that was engaging and easy to understand. In my role as an executive compensation consultant, I began to think of countless organizations that could benefit from Cash Balance Plans as a tax advantaged vehicle for capital accumulation. I have already spoken to many of our clients and professional associates about the benefits of CBPs, as well as the Kravitz Organization as a "top notch" provider.

This is a must read and great resource for benefit consultants who are dedicated to delivering optimal solutions and value to their clients. For those companies who fit the cash balance profile, it's an excellent vehicle to mitigate taxes and improve retirement outcomes.

I loved it and an easy read. They were able to make an otherwise difficult concept easy to understand! I read many articles and still didn't get the gist of these plans until I read this book. Very well done and recommended to anyone wishing to increase their knowledge of this "hybrid" plan.

Great read for helping advisors understand how to **MAX OUT** an owner above the standard \$52k limits in just a 401k/Profit Sharing Plan.

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